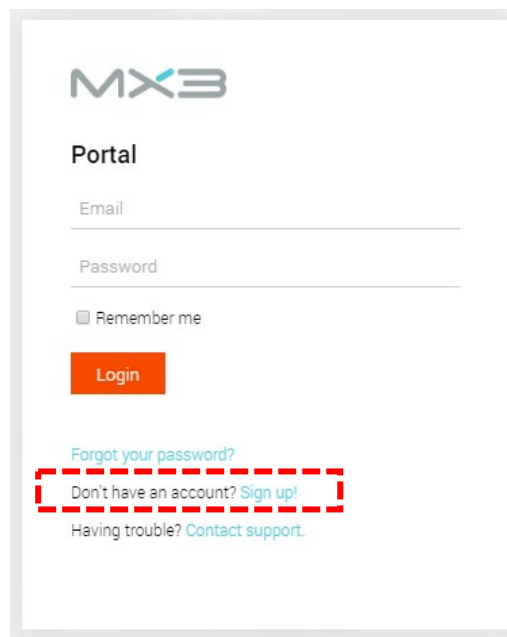# Portal Guide: Organizations and Teams

Welcome!

The MX3 Portal is the centralized database for MX3 Measurement Data.

This guide will walk you through how to set up your team or organization, manage user accounts and export data.

Account Registration

How do I register for an MX3 Account?

To register for an account visit https://portal.mx3.app and click "Sign up!"

You can also register for an account through the MX3 Mobile App

How do I upgrade to a team/organization account?

By default, a new account is an individual account. To upgrade to a team/organization account, log in to the portal, click on the settings icon in the top right and then click "upgrade to organization account" on the left.
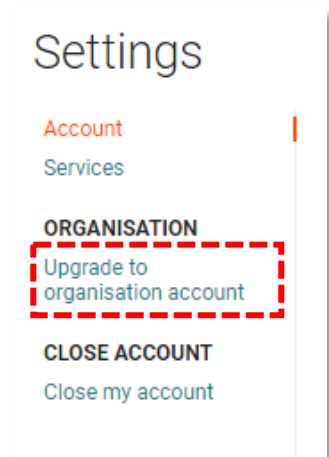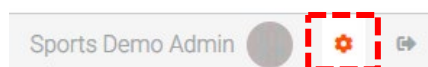
Portal Overview

What is the MX3 Portal?

The MX3 Portal allows you review your team or organizations data and manage user accounts.

You can use the portal to:

- Create new user accounts
- Categorize users for easier analysis and management using tags
- Upgrade users to administrators
- Upgrade users to managers of a tag
- View historical data and summary statistics
- Generate measurement reports
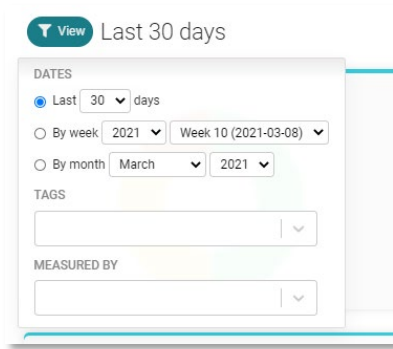- Export measurement data
- Manage organizational settings

The Dashboard

What is the Dashboard?

The Dashboard shows a summary of recent measurement by your team or organization. You can use the dashboard to get a quick overview of recent measurements, day to day measurement history, comparison between tags and other statistics.
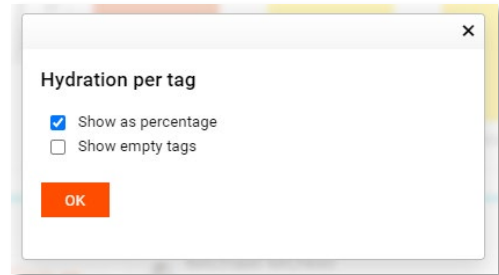
Dashboard views

You can filter the measurements which are used to generate the statistics on the dashboard by clicking the View button in the top-left corner.

Additionally, some of the cards on the dashboard have options where you can adjust how they are displayed. You can change these preferences by clicking the 🔧 icon.

Accounts

The MX3 Portal can be used by:

- Organizational administrators to manage all users and view all measurement data
- Tag managers who can view and create select users and their measurement data
- Users to manage their own accounts and view their measurement data

Each type of portal account has specific capabilities and permissions.

	Admin	Manager	User
Log into the Portal	✔	✔	✔
View and Export Measurement Data	✔	✔	✔
Create User Accounts	✔	✔	✘
Hide User Accounts	✔	✔	✘
Delete User Accounts	✔	✘	✘
Upgrade Users to Administrators	✔	✘	✘
Upgrade Users to Managers	✔	✘	✘
Create Tags	✔	✘	✘
Manage Tags	✔	✔	✘
Export Reports and Data	✔	✔	✔
Log in to the MX3 App	✔	✔	✔
Take Measurements in the MX3 App	✔	✔	✔

Administrators

What are administrators?

By default, the administrator is the person who registered your MX3 Account in the MX3 Portal or MX3 App. Administrators are your organization's direct contact with MX3 and can view and edit all accounts and data from your organization. Administrators have some unique capabilities:

- Only administrators can delete users from your organization
- Only administrators can upgrade users to administrators or managers.
- Administrators can edit all user accounts in your organization, including names, emails and passwords.
- Administrators can view all measurement data for your organization.

How do I create a new administrator?

Only administrators can upgrade other users to administrators.

To add a new administrator:

1. Click on the   🔧   Settings icon in the top right.

2. On the left sidebar, click "Administrators".
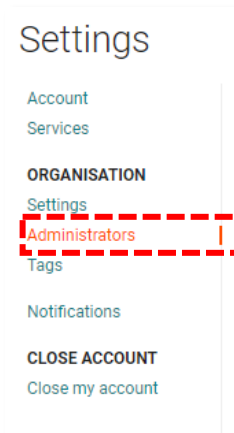
3. Use the search box to find the desired user account **(see User Accounts).**
    Note: Only a user with an associated email and password may be upgraded to an administrator.
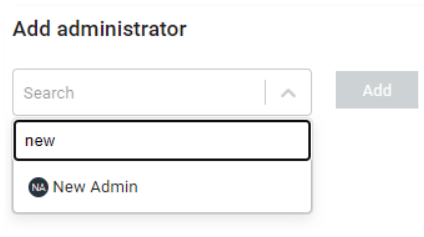
4. Click Add.

If a current administrator is not available to add a new administrator, please contact MX3 Support: support@mx3diagnostics.com.
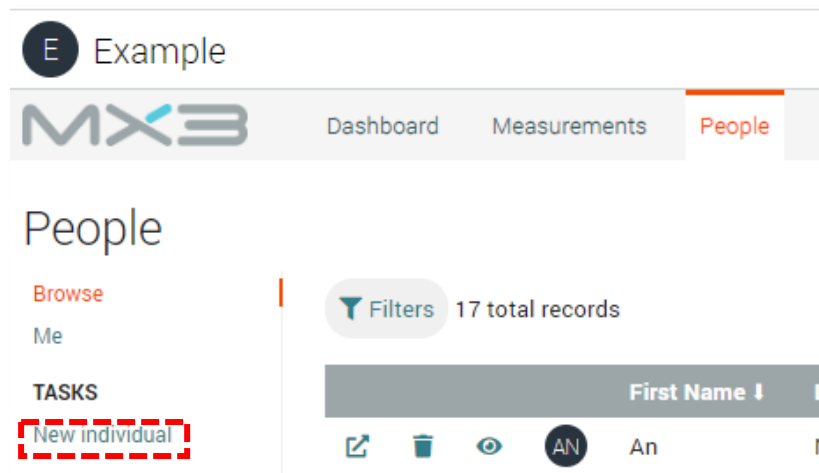
User Accounts

What is a User?

A user is a person within your organization who can be measured using the MX3 App.

How do I create a new user?

To add a new user:

1. Click on the People Tab at the top of the portal.
2. Click on "New Individual"

3. Record the user's first and last name.
4. **Optional:** Record the user's email and password. This will allow them to log in to the MX3 Portal and App. These fields can be completed later by editing the user's profile.
5. **Optional:** Tag the user (see **Tags**). You may also make the user a manager of a tag at this time (see **Tag Managers)**

How do I edit a user?

A user may be edited by clicking on the ⬀ icon next to their name on the People Tab. Changes will only be saved once the **Update** button is pressed.
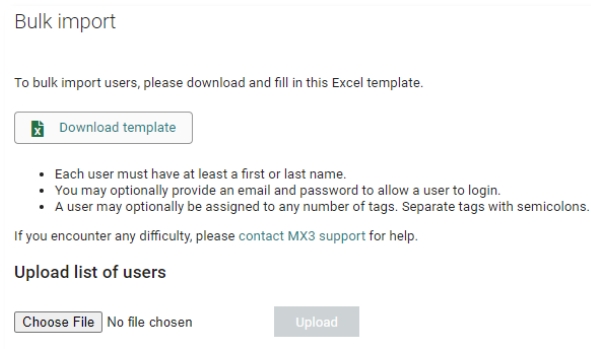
How do I hide a user?

A user may be hidden or unhidden by clicking ◉ the icon next to their name on the People Tab. Hidden users will not appear in the MX3 App, on the Portal Dashboard or on the Portal Measurements Tab. Hidden users can still log into the MX3 App and take measurements if a tag manager.
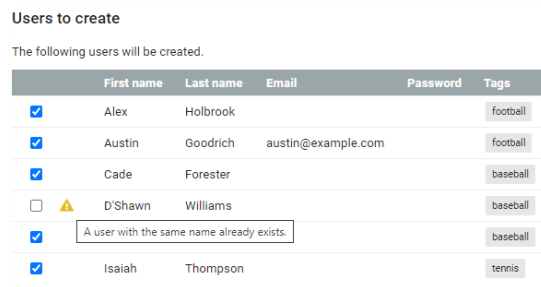
How do I delete a user?

Only administrators can delete a user. Users can be deleted by clicking on the 🗑 icon next to their name on the People Tab.

How do create users in bulk?

The Bulk Import page can be used to create many users at once.

1. Download and fill in the Excel template.
2. Choose your filled in file and click Upload.
3. You will be presented with a list of users which will be created.
   - If a user with the same name is detected, it will be highlighted with an exclamation ⚠ and not be imported by default. You can override this by checking the box.
   - If a user with an email which has already been used, it will be highlighted with a red exclamation ⚠. Such users cannot be imported unless the email address is changed.
   - Hover over any exclamation icons to see the reason.

4. Once you are happy with the list of users, press Apply to create the users.
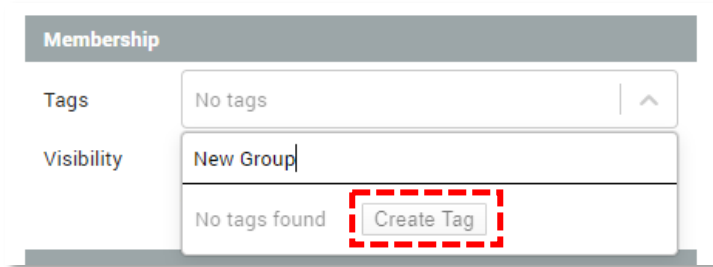
Tags

What is a tag?

A tag is used to categorize users. Examples of a tag could be a team (e.g. Women's Football Team), a position within a team (e.g. Goalkeepers), a shift (e.g. Morning Shift) or a location (e.g. New York Office). Users may be assigned to as many tags as desired.

How do I create a new tag?

To create a new tag:

1. Click on the People Tab at the top of the portal.
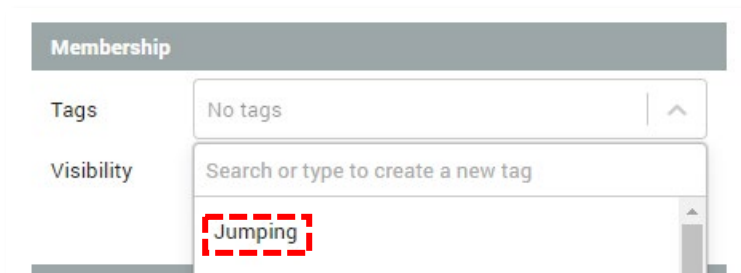2. Click on the ↗ icon next to a user you would like to tag.

3. Type the name of the new tag in the Tags box. Then click "Create Tag"

How do I add a tag a user?

To add a user to an existing tag:

1. Click on the People Tab at the top of the portal.
2. Click on the icon next to a user you would like to be tagged.
3. Type the name of the tag in the Tags box or select from the drop-down list.
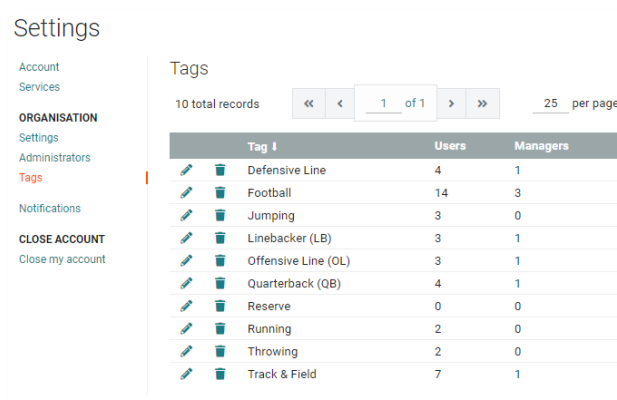

How do I remove a tag from a user?

To remove a tag from a user:

1. Click on the People Tab at the top of the portal.
2. Click on the icon next to a user you would like to remove the tag from.
3. Click on the **X** next to the tag name in the Tags box

How do I rename a tag?

In the settings page, you can see a summary of which tags exist, and rename or delete them if you wish.

Tag Managers

What is a tag manager?

A tag manager is an individual with additional permissions to modify and measure members with a specific tag. Examples of a tag manager would be a coach or trainer (e.g. A coach for a football team), a health and safety supervisor (e.g. OHS officer assigned to the AM shift) or an office manager (e.g. Manager of the New York office). Users may be assigned as a tag manager for as many tags as desired.

How do I make a user a tag manager?

Only administrators can make a user a tag manager.

To create a new tag manager:

1. Click on the People Tab at the top of the portal.
2. Click on the [icon] icon next to a user you would like to manage the tag.
3. If necessary, tag the user with the tag you would like them to manage (See **Tags**)
4. Click on the … next to the Tag name in the Tags box

5. Tick the box next to Manager in the pop-up and press OK
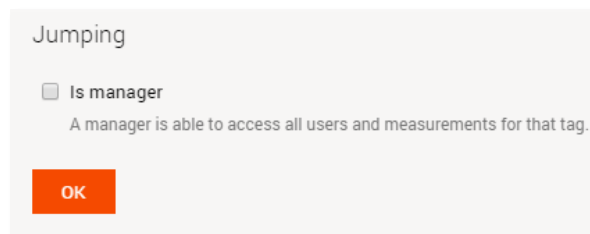
6. The tag will now appear red, indicating this user is a manager of this tag. Changes will be reflected next time the user logs into the MX3 App or Portal.
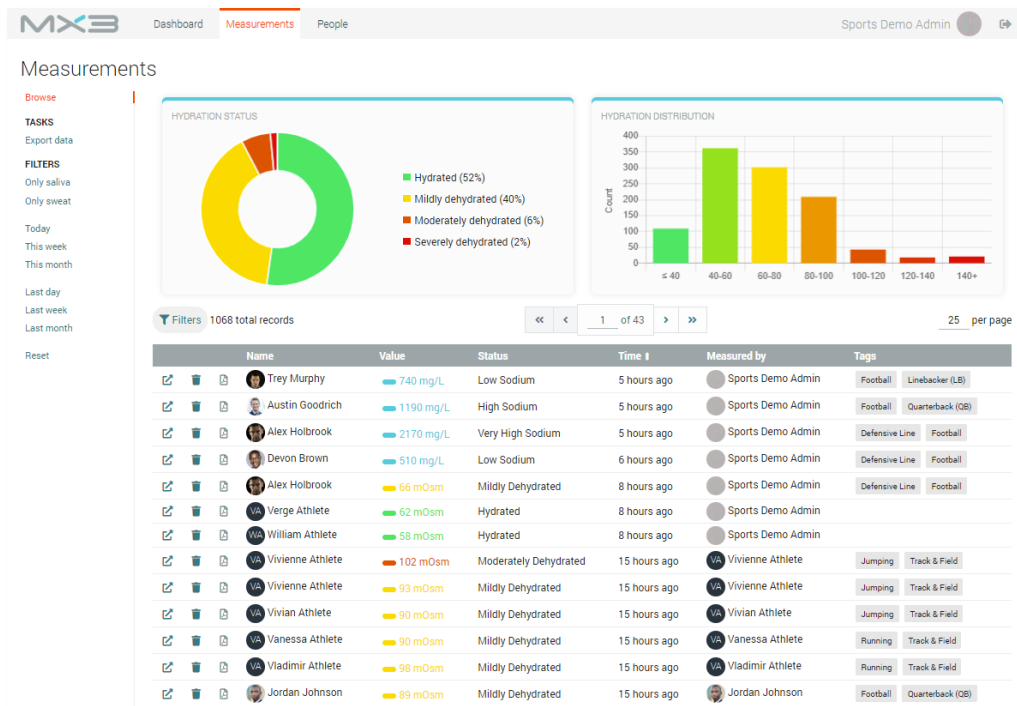

Can I hide a tag manger from the app/statistics?

By default, a tag manager will also appear as a member of that tag in the MX3 App and Portal, which may be undesirable when looking at summary statistics, or measurement compliance metrics.

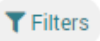To hide a tag manager from the MX3 App and summary statistics, click on the 👁 icon next to their name on the People Tab.

Measurement Data

How do I view measurement data?
You can view measurement data by clicking on the **Measurements** Tab.

Measurements may be filtered using the quick filters on the left side of the page or using the

 button.

You can also view data for a single user by clicking on the icon next to a user's name on the measurements tab or the people tab.

How do I export measurement data?
You can export filtered or unfiltered measurement data as a CSV by clicking "export data" in the top left of the measurements tab.
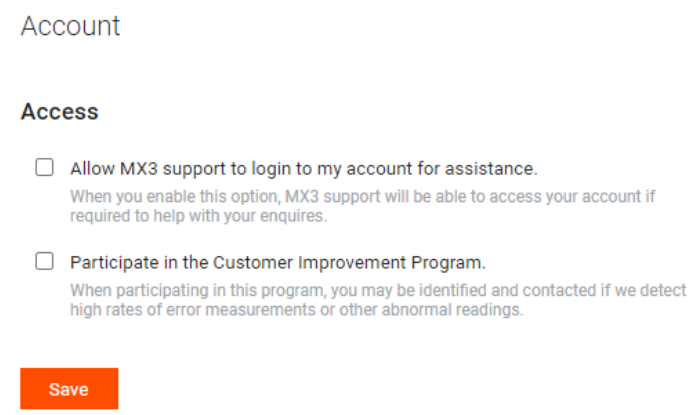
How do I generate a measurement report?
You can generate a pdf measurement report by clicking on the icon next to a measurement.

Settings

Privacy settings

You can adjust your account privacy settings by going to the Settings page using the ⚙ icon.

- You may allow MX3 to login to your account for assistance when contacting support.
- You may also permit MX3 to contact you if our automated systems detect you are getting high rates of error or abnormal readings.
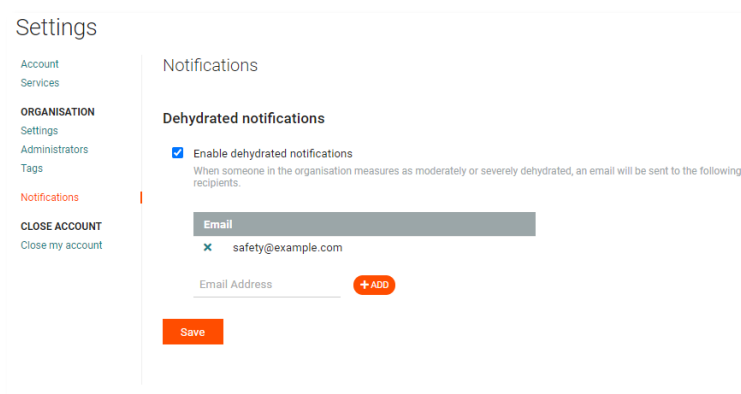

Dehydrated notifications

For an organization, you can setup automated email notifications if anyone measures as moderately or severely dehydrated.

1. Click the Settings icon and select Notifications from the sidebar.
2. Check the Enable dehydration notifications box.
3. For each email, enter the address and click Add.
4. Click Save.

Dehydrated notification emails come from support@mx3diagnostics.com, so be sure to whitelist the email address to ensure you receive the messages.

Closing your account

If you wish, you can close your account and remove your information from our systems. It may take up to 30 days for your data to be deleted.